

Tennessee Secretary of State  
Tre Hargett



Division of Business and Charitable Organizations  
312 Rosa L. Parks Avenue, 6th Floor  
Nashville, Tennessee 37243-1102

January 25, 2023

ERIC A JACOBSON  
1345 EASTERN FLANK CIRCLE  
FRANKLIN, TN 37064

**RE:** Registration to Solicit Funds for Charitable Purposes

Organization Name: BATTLE OF FRANKLIN TRUST

CO Number: CO14049

Renewal Date: 12/31/2023

Dear ERIC A JACOBSON :

Pursuant to the Tennessee Charitable Solicitations Act, T.C.A. § 48-101-501, *et seq.* the Tennessee Secretary of State has reviewed your application and is pleased to announce your organization's registration to solicit contributions has been **approved**.

The organization must maintain statutory compliance by submitting a renewal application and required fees on an annual basis. At that time you may be required to submit tax filings, financial statements, proof of IRS status, and other documents related to your organization and its fundraising activities. You can find additional information and submit additional filings online at <https://sos.tn.gov/charities>. The "CO" Number listed above will serve as your organization's charitable registration number and should be used when submitting any charitable filings or correspondence.

Please also be advised that if the organization's application or other provided information includes false, misleading or deceptive statements, appropriate action will be taken. Pursuant to the Tennessee Charitable Solicitations Act, a civil penalty of up to five thousand dollars (\$5,000.00) may be assessed for any violation.

Thank you for registering your organization and please do not hesitate to contact us with any questions.

Sincerely,

Tre Hargett  
Secretary of State

Tracking Number  
2023101387

## Application to Renew Registration of a Charitable Organization

Division of Business and Charitable Organizations

Department of State

State of Tennessee

312 Rosa L. Parks Avenue, 6th Floor

Nashville, Tennessee 37243

Phone: 615-741-2555

Fax: 615-253-5173

sos.tn.gov/charities



Tre Hargett  
Secretary of State

CO Number: CO14049  
Filed: 01/23/2023 07:31 AM  
Tre Hargett  
Secretary of State

### Organization Information

**Legal Name of the Charitable Organization:** BATTLE OF FRANKLIN TRUST

**Legal entity type of the Organization:** Corporation

**FEIN:** 27-0288159

**Initial Registration Date:** 09/21/2009

**Renewal Date:** 03/31/2023

**Has your fiscal year ending month changed since your last renewal?**

☐ Yes ☒ No

**Fiscal Year Ending Month:** June

**When and where was the organization legally established**

**Date:** 08/11/2009

**Country:** USA

**City/State:** FRANKLIN, TN

**County:** Williamson

**Has your Principal Office address changed since your last renewal?**

☐ Yes ☒ No

**Principal Office Address**

1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064

**Has your Mailing address changed since your last renewal?**

☐ Yes ☒ No

**Mailing Office Address**

1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064

**Contact Information for the Charitable Organization**

**Contact Name:** ERIC A JACOBSON

**Telephone Number:** (615) 786-1864

**Fax Number:** (615) 794-6563

**Email:** eric@boft.org

**Website:** www.boft.org

**Current names used by the charity organization**

**Do you need to modify other names that the charity solicits under?**

☐ Yes ☒ No

**Has the organization registered in any other state(s)?**

☐ Yes ☒ No

**Does the charity have other offices, chapters, branches, affiliates or a parent?**

☐ Yes ☒ No

**The category that best describes your organization**

W - Public Affairs, Society Benefit

**The charitable purpose of the organization**

Preservation, restoration and interpretation of historic properties, artifacts, documents, and other objects and materials related to the Battle of Franklin.

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**Tax & Financial Information**

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**Has your tax exempt status changed since your last renewal?**☐ Yes ☒ No**Last Fiscal Year Start:** July 2021**Last Fiscal Year End:** June 2022**Type of 990 Tax Form Filed:** 990 (Long Form)**Gross Revenue**

Direct and Indirect Public Contributions	\$ 507,411.00
Government Grants	\$ 139,400.00
Program Service Revenue	\$ 1,345,293.00
Special Events and Activities	\$ 66,995.00
Gross Sales of Inventory	\$ 254,691.00
Other Revenue	\$ 246,431.00
<b>Total Revenue</b>	<b>\$ 2,560,221.00</b>

**Expenses**

Total Program Expenses	\$ 1,543,742.00
Direct Expenses from Special Events	\$ 32,662.00
Cost of Goods Sold	\$ 132,574.00
Management and General Expenses	\$ 123,341.00
Fundraising Expenses	\$ 214,817.00
Other Expenses	\$ 0.00
<b>Total Expenses</b>	<b>\$ 2,047,136.00</b>

<b>Excess/Deficit For the Year (Total Revenue - Total Expenses)</b>	<b>\$ 513,085.00</b>
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**Changes in Net Assets/Fund Balances**

Net Assets/Fund Balances at Beginning of Year	\$ 7,239,419.00
Other Changes in Net Assets or Fund Balances	(\$ 545,879.00)
Net Assets/Fund Balances	\$ 7,206,625.00
Total Liabilities at End of Year	\$ 77,942.00
Net Assets/Fund Balances at End of Year	\$ 7,206,625.00

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## Solicitation Information

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Have you been enjoined by any court from soliciting contributions?

☐ Yes ☒ No

Does your organization contract with or otherwise engage the services of any outside fundraising professional (such as a “professional fund-raiser,” “paid solicitor,” “fund raising counsel,” or “commercial co-venturer”)?

☐ Yes ☒ No

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## Officer Information

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Do you need to modify the current officers?

☒ Yes ☐ No

List each officer, director, and trustee (at least 2 officers are required, and you must list officers who have or share the following titles: "Chief Financial Officer", "Custodian of Contributions", "Custodian of Final Distributions")

Barry Allen  
1345 Eastern Flank Circle  
Franklin, TN 37064, USA  
Title(s): Board Member

Eric A. Jacobson  
1345 Eastern Flank Circle  
Franklin, TN 37064, USA  
Title(s): Custodian of Contributions, Custodian of Final Distributions, Chief Executive Officer

L. Hunter Battle, Jr.  
1741 Fieldcrest Circle  
Franklin, TN 37064, USA  
Title(s): Treasurer, Director

JEFF LEDBETTER  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

DEBORAH WARNICK  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

MATT ROBERTS  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

PAUL GADDIS  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

LIBBY SCHMELTZER HINSON  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

INETTA GAINES  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

AMANDA ROSE  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

KIMBERLY CLUTSAM  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

KELLY GILFILLAN  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

ALMA MCLEMORE  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

LAUREN WARD  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director

JIM ROBERTS  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director, Vice Chairman

LAURA HOLDER  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director, Secretary

GARY ROSENTHAL  
1345 EASTERN FLANK CIRCLE  
USA, FRANKLIN, TN 37064  
Title(s): Director, Chairman

**Has any officer, director, manager, operator, or principal of the organization been the subject of an injunction, judgement, or administrative order or been convicted of a felony?**

☐ Yes ☒ No

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## Signature

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I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

**Signed Electronically:** Gary Edward Rosenthal

**Date:** 01/20/2023

**Title:** Chairman

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

**Signed Electronically:** Eric A Jacobson

**Date:** 01/22/2023

**Title:** Chief Administrative Officer



Tre Hargett  
Secretary of State

**Division of Business and Charitable Organizations**

**Department of State**

State of Tennessee  
312 Rosa L. Parks Avenue, 6th Floor  
Nashville, Tennessee 37243  
Phone: 615-741-2555  
Fax: 615-253-5173  
sos.tn.gov/charities

**Date:** 01/23/2023

**Invoice:** 2023-00642

**Customer Information**

ERIC A JACOBSON  
BATTLE OF FRANKLIN TRUST  
1345 EASTERN FLANK CIRCLE  
FRANKLIN, 37064

Tracking Number	Description	Amount Paid
2023101387	CH Charitable Renewal	\$ 10.00
<b>Payment Details</b>		
	Fee Total:	\$ 10.00
	Payment Total:	\$ 10.00
	Amount Due:	\$ 0.00
<b>Payment Method</b>		
	Payment Type:	eCheck
	Check/Confirmation Number:	3843820498